

■ Requests for Proposals

When a company or another organization needs a task performed or a service provided outside its staff expertise or capabilities, it seeks help from vendors that can provide the expertise or capabilities needed. The company seeking help usually makes its requirements known to potential vendors by issuing a request for proposals. The RFP details the company's requirements so that vendors can evaluate whether to bid on the project.

The details provided in an RFP permit vendors to understand your needs and enable you to determine from their responses which vendor to select to meet your requirements. Although RFPs lay out your requirements, they usually do not specify how these requirements are to be met. Potential vendors prepare proposals to describe their solutions for meeting your requirements; you then choose from among them the one that best suits your needs, budget, and schedule.³

RFP Structure

Like proposals, RFPs vary in length, formality, and structure. Some are a page or two, and others run to hundreds of pages. The scope of information included and even the terminology used to describe specific sections vary with the type of task or service being solicited. For example, RFPs involving computer systems usually include a "Technical Requirements" section, specifying site-preparation requirements and describing the current technical infrastructure at the company issuing the RFP. The purpose and context of RFPs also vary. Each RFP involves unique

³A related document is an invitation for bids. An IFB strictly defines the quantity, type, and specifications for an item that an organization, such as a government agency, intends to purchase.

legal, budgetary, confidentiality, and administrative considerations. The following sections describe typical components for RFPs.

Information About Your Company

One section of an RFP should describe your company's mission, goals, size, facility locations, position in the marketplace, and possibly a brief company history. It should also provide your company contact information. This section parallels the "Description of Vendor" section in proposals (see Figure 13-27 on page 483).

Project Description

Another section, sometimes called "Scope of Work" or "Workscope Description," describes the deliverable (the product or service) you need, with a detailed list of requirements. For example, an RFP prepared by a pharmaceutical company soliciting training for its sales representatives about a new drug divided the project description into three sections:

- Target audience (members of sales staff and their technical background and computer experience)
- Content (specific curriculum and length of training)
- Deliverable (in-person training, online or virtual training by Webinar, Web site, or video)

Vendors responding to this RFP would organize their proposals in line with these requirements. For some projects, requirements can be described in a summary statement, as shown in the following examples.

- ▶ The project deliverable will be a questionnaire to be mailed to approximately 400 adults regarding their consumer experiences with various health-care providers.
- ▶ The deliverable will be a networked online-forms package for approximately 1,200 employees, permitting information to be completed online, stored in a database, routed by e-mail, and printed on paper. The package shall be integrated into the company's current network environment at its headquarters facility.

The project description may also indicate whether the deliverable must be created new or can be obtained commercially and adapted to the project's needs. For example, if the project involves software development, the description may state whether the requesting company prefers commercially available software or expects the vendor to develop unique software for the project. The project-description section can also specify other details such as a project-management plan and any warranty or liability requirements.

Delivery Schedule

For complex projects lasting a month or longer, specify the time allotted for the project and a proposed schedule of tasks.

Proposal Description

Many RFPs provide format requirements for proposals, such as how the proposal should be organized; the number of copies expected; whether an electronic file is required; where, the date by which, and to whom the proposal should be e-mailed or sent; and how the proposal should be sent (registered mail, courier service, etc.). Many companies now provide an electronic proposal template for vendors to follow.

Vendor Qualifications

Most RFPs request information about the vendor as well—a summary of the vendor’s experience, professional certifications, number of employees, years in business, quality-control procedures, awards and honors, and the like. An RFP may require references from recent customers as well as financial references. The RFPs usually require that vendors submit the résumés of the principal employees that would be assigned to the project.

Proposal-Evaluation Criteria

The proposal-evaluation section informs vendors of the criteria your company or organization will use to select the vendor to work for you. Will you decide solely on cost? a combination of cost and vendor past performance? technical expertise? Many companies organize the criteria by importance or weight while others grade proposals with a point system and include a table of criteria, each of which is given a point value on a scale of either 100 or 1,000 total points, as in the following sample:

▶ Proposal-Evaluation Criteria

CRITERIA	POINTS
Administrative	50
Technical	700
Management	100
Price	100
Presentation and demonstration	50
Total	1,000

ON THE WEB

To view the RFP that accompanies the sample Waters proposal, go to bedfordstmartins.com/writingthatworks and select *Model Documents Gallery*.

Appendixes

Some RFPs include one or more appendixes or “Attachments.” These may include sample forms and questionnaires, a sample contract, technical information about a company’s server and workstation configurations, workflow-analysis diagrams, dates and times when vendors can visit the work site before finalizing their proposals, and other essentials too detailed for the body of the RFP.

ETHICS NOTE

If your RFP contains any company-confidential information, you could include a legally binding nondisclosure statement for vendors to sign before you send the full RFP. Many companies also include a guarantee not to open proposals before the due date and never to disclose information in one vendor's proposal to a competing vendor.
